

TO: POTENTIAL PROPOSERS

FROM: Administrative Office of the Courts (AOC)

DATE: December 23, 2008

**SUBJECT -
PURPOSE OF
MEMO:** Request for Proposals (RFP)
To issue Addendum Number 1 to EOP2008RCS-CT and, as set forth in attached documents: (1) to publish the AOC's Responses to Vendors' Questions, for those questions received by the deadline; (2) to revise the RFP, inclusive of changes to the target launch date and addition of an internal resource table to Section 10.11, Personnel; (3) to replace sections 4.1 and 6.0 of Attachment 5, Statement of Work; (4) to delete language from Exhibit C, #10 of the Attachment 2, Minimum Terms and Conditions.

**ACTION
REQUIRED:** You are invited to review and respond to the attached Request for Proposal ("RFP") as posted at <http://www.courtinfo.ca.gov/reference/rfp/>:
Project Title:
Web Redesign Implementation and Migration Services
RFP Number: EOP2008RCS-CT

**SOLICITATIONS
MAILBOX:** solicitations@jud.ca.gov

**DUE DATE &
TIME FOR
SUBMITTAL OF
QUESTIONS:** Deadline for submittal of questions pertaining to solicitation document is: **1:00 p.m. (Pacific Time) on December 18, 2008**

**PROPOSAL DUE
DATE AND
TIME:** Proposals must be received by **3:00 p.m. (Pacific Time) on January 15, 2009**

**SUBMISSION OF
PROPOSAL:** Proposals should be sent to:
**Judicial Council of California
Administrative Office of the Courts
Attn: Nadine McFadden
RFP No. EOP2008RCS-CT
455 Golden Gate Avenue
San Francisco, CA 94102**

AOC Responses to Vendors' Questions

Question 1.

Should we expect to handle all content migration or will the SF AOC team participate in the migration effort?

and

Based on our experience, in spite of the efficiencies through the automated migration, the efforts required for migration of the identified number of pages would require additional efforts. Is AOC open to negotiations in this area? Is there a possibility of additional funding or limitation to the scope?

AOC Response to Question 1:

The AOC acknowledges that the migration of content will require substantial effort.

The AOC needs to understand how much migration assistance can be afforded within the available budget, as well as the Vendor's total estimated effort and cost for consulting services to complete the migration.

The AOC therefore requests that Vendors bid on the total content migration deliverable in their price proposal, inclusive of the total number of estimated hours to complete the migration. The AOC recognizes that this may cause a Vendor's overall price proposal to exceed the stated budget; this will not disqualify a proposal from consideration.

Question 2.

What process or benchmarks were used for determining that September 2009 was an achievable launch date? Is there a breakdown of assumptions by tasks or milestones?

AOC Response to Question 2:

The RFP has been modified in response to this question. Although the AOC did extensive analysis in determining the September launch date, this date was dependent on an earlier RFP release and subsequent project start date; the date had not been modified to reflect internal delays in RFP release.

Vendor proposals should provide their best estimate for a realistic launch date based on the information provided in the RFP (and AOC resources outlined in the response to Question 28 of this document). The AOC will then work with the selected Vendor to refine the launch date. Additionally, the AOC needs to present a portion or prototype of the redesigned site at a conference in September of 2009; this should be supported by the project plan.

Question 3.

The cost spreadsheet is broken down by hours and rates by resource. Are you expecting a time & materials bid, or a fixed bid for services?

or

Is a fixed priced proposal expected for this engagement? What are the expectations of the

AOC concerning this matter?

AOC Response to Question 3:

The AOC requests fixed bid pricing by deliverable. The resource rates and hours are required in order to provide insight into deliverable bids.

Question 4.

On Attachment 2, page 21, the Minimum Terms and Conditions state the deadline for final invoice is August 30, 2007 as the final invoice date. Should that date be changed to October 31, 2009?

AOC Response to Question 4:

This text was not applicable to this solicitation and has been removed from Attachment 2, Minimum Terms and Conditions. Vendors should refer to the updated attachment, stated dates in the main RFP and target dates in Attachment 5, Statement of Work.

Question 5.

What is the status of the redesign project? Will the information architecture and visual design be complete at the start of this effort?

and

RFP Section 6.6.1 states that *“All AOC sites will be consolidated into a single site with a shared architecture, visual design, templates, and navigation.”*

Has the visual design and information architecture been completed these sites already?

AOC Response to Question 5:

The information architecture and visual design are in review with AOC teams.

Although some overlap will occur between the redesign project currently underway and the implementation project addressed by this RFP, the information architecture and visual design components will be complete by February 28, 2009.

Question 6.

Will LiveServer be used for all of the websites defined in this document? If not, can you tell us which will leverage LiveServer?

and

Referring to the RFP item 1.2 “The AOC has acquired the RedDot CMS and RedDot Live Server to support its Web content management needs.” What are the expected modules and options of LiveServer to be deployed by the AOC?

AOC Response to Question 6:

As stated in Section 6.6 of the RFP, “All AOC sites will be consolidated into a single site with a shared architecture, visual design, templates, and navigation.” The AOC anticipates that LiveServer will be leveraged as required to deliver targeted content based on authenticated user roles for the secure state of the new site. The AOC seeks Vendor guidance on best practices and strategy for implementation of the redesign vision.

Details of the LiveServer implementation will be determined collaboratively during the System Design and Specification portion of the project.

Question 7.

Can the vendor be granted access or given a walk-through of the Serranus site mentioned in Section 6.4 of the RFP?

AOC Response to Question 7:

No, the AOC will not provide access to, or a functional walkthrough of the Serranus Web site. Rather, we have compiled the following information detailing specific functionality within the site.

The majority of the Serranus Web site contains static HTML pages and PDF documents (per the estimates provided in section 6.5.2). Additionally, Serranus contains the following functionality:

Constrained searches (via Google Mini), which provides a visitor the ability to restrict their search to a directory of content (e.g., of HR information, or news archives, etc.).

Constrained access (via Siteminder), which we use to restrict access to some content to a subset of the entire Serranus audience.

ColdFusion applications that:

- 1. Serve up real-time data from Oracle databases (e.g., for a person directory search, to post/edit/delete a listing of surplus materials, to input/edit planning documentation via web forms);**
- 2. Serve up a Judicial Branch Master Calendar from Outlook;**
- 3. Provide filtered searches using (via a combination of ColdFusion, Google, and PDF/DOC files with defined metadata titles)**
- 4. Collect/report data via web forms (e.g., publications order form, listserv registration form, etc.)**

Perl applications, including:

- 1. A self-publishing tool that allows content publishers to post and archive news items**
- 2. A forms filtering/display feature (same that is provided on the public site (www.courtinfo.ca.gov/forms/)**

Question 8.

Regarding COMET and the Education Portal, can you provide access to this or a walk-through of the functionality?

AOC Response to Question 8:

These sites are publicly available, at the following URLs:

Education Portal: <http://www2.courtinfo.ca.gov/cjer/>

COMET: <http://www2.courtinfo.ca.gov/comet/>

Question 9.

Regarding the “Miscellaneous Web Sites” called out in section 6.4.3 of the RFP, Can you provide an idea of the number of sites, the amount of content and any of the functionality on these sites?

AOC Response to Question 9:

There are approximately fifteen (15) of these smaller Web sites, all of which contain static content. The amount of content is provided in RFP Section 6.5.2.

Question 10.

Regarding Section 6.5, Content Estimates for Migration; is the reduction in content uniform across the sites or is there one or more sites that represent the majority of the content reduction effort?

AOC Response to Question 10:

The following revised figures replace the table in Section 6.5.2 of the RFP, and reflect partial completion of the content clean-up efforts. Although the AOC anticipates some additional reduction in volume prior to migration, the Vendor should use these figures in preparing their proposal.

<u>Site</u>	<u>Rough Numbers of Files</u>
California Courts Web Site www.courtinfo.ca.gov	HTML: 5,729 Graphics: 3,275 DOC: 24,698 PDF: 33,672 XLS: 142
<u>Serranus Extranet</u>	HTML: 3,242 Graphics: 1,173 DOC: 1,842 PDF: 10,156 XLS: 440
<u>Education Portal</u>	HTML: 414 Graphics: 858 DOC: 2 PDF: 225 XLS: 1

<u>Site</u>	<u>Rough Numbers of Files</u>
Miscellaneous Web sites	HTML: 8,362 Graphics: 6,288 DOC: 1,375 PDF: 2,060 XLS: 318

Question 11.

Will the content reduction process take place prior to or during the content migration effort?
or
Regarding RFP Section 6.5, Content Estimates for Migration: What is the timeframe for completion of the content cleanup task?

AOC Response to Question 11:

The content clean-up is underway and will be complete by February of 2009.

Question 12.

Is it your intention to keep the PDFs in PDF format or to convert them to HTML?

AOC Response to Question 12:

For the majority of PDF content, the files will remain in PDF format. In a few cases, the AOC may decide to convert PDF content into HTML in an effort to optimize the user experience. We anticipate this effort to be negligible and will handle it with internal resources.

Question 13.

RFP Section 6.6.1 states that *“All AOC sites will be consolidated into a single site with a shared architecture, visual design, templates, and navigation.”*
Is that the goal of this initiative?

AOC Response to Question 13:

This is one facet of, but not the goal, of the project. The goals of the project are outlined in RFP Section 5.4.

Question 14.

RFP Section 6.6.1 states that *“All AOC sites will be consolidated into a single site with a shared architecture, visual design, templates, and navigation.”*
Should we expect that the extranet, the education portal and the miscellaneous sites will be consolidated as well?

AOC Response to Question 14:

Yes. As stated in RFP Section 6.1, all of the sites listed are in scope for the Web Redesign Implementation and Migration project.

Question 15.

If the information architecture and design has been completed, are they reasonably uniform (mirroring the design examples provided in the RFP)?

AOC Response to Question 15:

The design examples provided in the RFP are accurate depictions of the new design and information architecture scheme.

Question 16.

RFP Section 6.6.2 states *“The success of the redesign will depend on a complex, roles-based content delivery model, leveraging a secure environment for branch (internal) users.”*

Should we assume that all real-time delivery will be handled via LiveServer?

AOC Response to Question 16:

The AOC has not made a decision regarding the best approach to implementation of the role-based content delivery model. LiveServer is one of the tools that will be available for implementation of this requirement, but final decisions will not be made until the System Design and Specification deliverables are completed for the project. The AOC anticipates working with the selected vendor to determine the best way to implement the role-based content delivery model.

Question 17.

Attachment 5, Statement of Work, states *“Services in support of this initiative shall include, but are not limited to the following”*

Can you provide some examples of services not yet defined that might be included? Will there be a new RFP issued to address services required that are unforeseen?

AOC Response to Question 17:

No additional services have been identified or defined by the AOC. The Vendor is invited to redline the Statement of Work with suggested changes based on their experience with similar projects.

Question 18.

There is not a specific breakout of individual sites as it relates to roles and responsibilities in the document, so should we assume that the work elements and deliverables as outlined in the tables apply to all sites defined in the main RFP?

AOC Response to Question 18:

Yes.

Question 19.

Based on the current progress of the project, do you see major reorganization of the website content? Especially are there scenarios such as: existing page content being distributed over one or more pages, or page content from one or more pages being combined in one page?

AOC Response to Question 19:

The AOC anticipates a moderate amount of content re-organization throughout the sites.

Question 20.

Would the Web design firm provide detailed content mapping of the existing website content to the redesigned information architecture?

AOC Response to Question 20:

The AOC's final information architecture document will dictate how existing content will be mapped to the new site. The AOC anticipates collaborating with the selected vendor to strategize all migration-related issues as described in the Content Preparation Section 3.0 of the SOW (Attachment 5).

Question 21.

What is the timeframe for completing the HTML templates?

AOC Response to Question 21:

Final templates are anticipated to be delivered no later than April 30th, 2009.

Question 22.

What are the expected timeframes for hardware procurement and installation?

AOC Response to Question 22:

The development environment is currently available. AOC is starting the request process for the staging and production environments, which will be hosted in the California Courts Technology Center. Exact dates for the availability of these environments have not yet been determined.

Question 23.

Depending on the scope of desired functionality and features, and the features supported by the RedDot CMS, the customization efforts could be extensive. Similarly, customization or addition of new HTML template(s) may need additional efforts, depending on the scope. Is there additional funding available to address such scenarios?

AOC Response to Question 23:

The scope of the work defined for this solicitation will be limited to what can be achieved within the given budget.

Question 24.

Regarding the delivery of RedDot training to the AOC Project Team: is this referring to RedDot Product Training or functional user training?

AOC Response to Question 24:

The training called out as a Vendor deliverable in the statement of work, “Deliverable:

Delivery of RedDot training to the AOC Project Team; inclusive of Content Builder training, Administrator training and LiveServer training,” is product training for the developers and analysts on the AOC project team.

If the Vendor is qualified to provide this training, please include pricing for the deliverable in the Cost Proposal. If the vendor is not qualified or prefers not to bid on this deliverable, exclusion of it from the proposal will not disqualify a proposal from consideration.

Question 25.

Regarding Attachment 5, Section 5.1 (Statement of Work): We are not based in San Francisco, but the project manager can travel to San Francisco for face-to-face meetings. Is that acceptable?

AOC Response to Question 25:

Yes, this is acceptable. The Project Manager is not required to work on site. Section 5.1 of the Statement of Work has been modified to reflect this.

Question 26.

Is there a Small Business Preference for this proposal?

AOC Response to Question 26:

No.

Question 27.

While coding will be required, will the selected vender be given full access to all source code, FTP access to hosting servers, and remote access to all SQL Servers via Query Analyzer tool?

AOC Response to Question 27:

Non-AOC staff are not granted remote access to AOC servers, including our Oracle database servers. Vendors will be provided access to AOC-developed source code appropriate to the success of the Web site redesign.

Question 28.

Aside from the Project Management team of 3 individual from AOC, who will be other resources offered by the AOC concerning the Web Redesign Implementation and Migration project? What will each individual's skill-set be?
and

What will be the level of availability of these resources offered by the AOC on the team?

AOC Answer to Question 28:

Section 10.11 of the RFP has been modified in response to this question.

The following table provides an overview of AOC resources allocated to the Redesign Implementation Project. In addition to these resources, content owners will be made

available for meetings, design and training activities throughout the duration of the project. Content owners will also be made available for facilitation, validation and some direct participation in content cleanup, tagging and migration activities.

AOC Internal Resources for Web Redesign Implementation		
Resource	Allotment	Role
AOC 1	50%	Project Director, Web Communications
AOC 2	25%	Project Director, Information Systems
AOC 3	100%	Project Manager and Analyst
AOC 4	100%	Web developer
AOC 5	75%	Analyst
AOC 6	75%	Analyst
AOC 7	50%	Analyst
TOTAL	4.75 FTEs	

Question 29.

Do these AOC team members have an intimate knowledge of the ongoing AOC Web Redesign project?

AOC Answer to Question 29:

Yes, with the exception of two individuals to be hired prior to start of the implementation (AOC 6 and AOC 7 in the table contained in the AOC Response to Question 28.)

Question 30.

Has the AOC identified testing software and bug tracking software to be used during unit tests? If so, what is that software?

AOC Answer to Question 30:

The AOC uses IBM's Rational Tool Suite, including ClearQuest™ for defect tracking, Rational Functional Tester and ClearQuest™ Test Manager for functional testing.

The following table replaces the table in Attachment 5, Section 4.1, Deliverable Dates Table.

Web Redesign Implementation and Site Migration Project: Key Dates and Deliverables Due Dates	Planned Due Date
Document and present to AOC the recommended Redesign Implementation strategy and approach	January March 2009
Project Plan and Schedule	January March 2009

Web Redesign Implementation and Site Migration Project: Key Dates and Deliverables Due Dates		Planned Due Date
Risks and Mitigation Planning Document		January March 2009
Delivery of RedDot training to the AOC Project Team; inclusive of Content Builder training, Administrator training and LiveServer training		February April 2009
Taxonomy and Metadata Design Document		March May 2009
Content Analysis and Recommendations Document		March May 2009
Content Migration Process and Policy		March May 2009
Content Migration Plan (Logistical)		March May 2009
Workflow Definition Document		April July 2009
Functionality and Feature Specifications Document		April July 2009
Security Design Document		April July 2009
Technical Requirements Document		April July 2009
CMS Template Design Document		April July 2009
Completed Configuration and Development of RedDot enabled site		June August 2009
Corrective action based on testing		June August 2009
Test Plans		June August 2009
Content Migration (per the Content Migration Process and Policy)		August October 2009
Deployment Plan Check List and Schedule		August October 2009
Re-launch of AOC Web Sites		September December 2009

The following section replaces Attachment 5 Section 6.0, The Project Management Process.

6.0 The Project Management Process

- 6.1 The Vendor shall provide an ~~on-site~~ experienced Senior Project Manager to the AOC account.
- 6.2 The Vendor shall staff an upper-level relationship manager for this account, providing strategic support, a senior interface with AOC leadership, and a point of escalation for any and all needs.
- 6.3 The Vendor shall use ~~Microsoft Project~~ standard project management methodology and tools (e.g. Microsoft Project or similar software) to manage the project timeline and Deliverables, offering a documented manner in which to monitor project progress and identify critical path Deliverables.
- 6.4 The Project Management Team shall deploy a secure project site which can serve as a central workspace for project documents (statements of work, Deliverable documents, project plans, etc.) and team contact information. This will be deployed during Project Initiation.
- 6.5 The AOC and Vendor will assemble a Project Management Team (Project Management Team), consisting of no more than three (3) representatives from each party. This team shall include the Vendor and AOC Program and Project Managers.
- 6.6 The Vendor shall coordinate Deliverable review via a process agreed upon by the Project Management Team.

The following text has been stricken from Attachment 2, Exhibit C Item #10:

10. Deadline for Final Invoice

~~In order to comply with the requirements of the Grant, the State requires that Work must be completed and the Contractor's final invoice must be received by AOC's Accounts Payable no later than August 30, 2007.~~

End of Addendum Number 1